



## Vermont Public Service Department & Clean Energy Development Fund

### **REQUEST FOR PROPOSALS**

October 12, 2021

### **Administration of the Vermont Small Scale Renewable Energy Incentive Program**

#### **INTRODUCTION**

The Vermont Public Service Department's (PSD's) Clean Energy Development Fund (CEDF) is seeking the services of a qualified contractor with knowledge of renewable energy technologies, experience with federal grant requirements, and demonstrated experience in administrating, managing, and designing energy incentive programs to administer the Vermont Small Scale Renewable Energy Incentive Program (Program).

The selected contractor will demonstrate knowledge and experience in stakeholder outreach, public communications, web site and database design and management, as well as program monitoring, data collection, and evaluation. The Program currently supports small-scale wood heating and wood fuel storage installations throughout Vermont with both State and Federal funds. Starting in 2022 the Program will be deploying American Recovery Plan Act (ARPA) funds for incentives to low- and moderate-income Vermonters and select schools and small businesses. These ARPA funds will require compliance with US Treasury guidelines including the need to provide income eligibility verification of the households receiving ARPA incentives.

The contractor will work closely with the PSD, the CEDF, renewable energy installers/stakeholders, and the public to support the installation of small-scale renewable energy systems in Vermont.

**Proposals are due by 4:00 P.M. on Tuesday, November 2, 2021**, with the goal of finalizing a contract before January 3, 2022. The contract period will run to December 2024 or when funds available for the SSREI Program are fully expended.

The CEDF has budgeted \$566,000 of CEDF and CEDF-ARRA funds to continue the *Vermont Small Scale Renewable Energy Incentive Program* for fiscal year 2022. In addition, the PSD/CEDF has \$5 million of ARPA funds, some portion of which will likely be allocated to incentives for low- and moderate-income Vermonters via the SSREIP. These funds will pay for the clean energy system incentives as well as for the administrative and program delivery costs of the chosen contractor and the PSD.

Applicants are encouraged to submit applications by email. Those mailing hard copies of their proposals should allow adequate time to ensure receipt of their proposal(s) by the deadline. Proposals are limited to 10 pages, with no less than a 12-point font and one-inch margins.



Email proposals to:  
Andrew.Perchlik@Vermont.gov

If mailing proposals, send to:

Andrew Perchlik  
CEDF c/o Vermont Public Service Department  
112 State Street  
Montpelier, VT 05620-2601

## **BACKGROUND**

The Vermont Small Scale Renewable Energy Incentive Program (Program) was originally established pursuant to renewable energy legislation passed by the Vermont State Legislature during the 2002/2003 session and signed into law by Governor Douglas in June 2003. Since 2003 the program has undergone at least fifteen substantial program changes and funding rounds.

The CEDF will continue with the current incentives offered by the Program in 2022 and will be developing new incentives for the ARPA funds. The selected contractor should be able to implement the Program incentives as soon as possible in 2022. The CEDF may make additional changes to the incentive program during contract term; the contractor will be responsible for implementing such changes and may be asked to provide comments on draft changes being considered by the CEDF.

The Program provides incentives to eligible individuals, schools, low-income households, non-profits, and municipalities for a portion of the cost of installing renewable energy systems. Incentive levels and program design may be changed by the CEDF in the future.

For additional information on the Vermont Small Scale Renewable Energy Incentive Program and its current incentives visit: [www.erc-vt.org](http://www.erc-vt.org)

## **MINIMUM SCOPE OF SERVICES:**

- Provide daily administration and program management of the Vermont Small Scale Renewable Energy Incentive Program.
- Maintain a program database that shall include project and incentive metrics on all awards as detailed by the CEDF.
- Establish a mechanism to verify income eligibility of recipients of ARPA funds consistent with ARPA and CEDF requirements.
- Identification of selected Vermont populations to encourage their participation in the Program.



- Incorporate program incentive changes promptly as required by the CEDF and adapt program information, website, and forms to reflect changes.
- Keep updated and distribute incentive program eligibility guidelines, participation steps, and application forms. This includes distribution of program information, public outreach activities and education activities including customer service by phone, email, and at appropriate public events, including meetings and community forums.
- Maintain a website, which shall include: program eligibility guidelines, participation steps and application forms, number and average costs of systems installed (updated at minimum on a quarterly basis), and amount of incentive funding distributed, reserved, and remaining (updated at minimum on a monthly basis).
- Receive, review, and determine eligibility on all incentive applications.
- Receive and review final project documentation for incentive payments.
- Perform and report on monitoring and verification of incentive savings and performance of installed systems and/or measurers.
- Provide the CEDF monthly, quarterly, and annual reports describing program activities and outcomes.
- Provide incentive installation data in a format prescribed by the CEDF on a quarterly basis.

The selected contractor shall provide analysis of program data and potential changes requested by the CEDF.

The CEDF will at minimum provide input on the development and administration of the program, including incentive levels, application requirements, program forms, and inspection levels for installed systems.

## **INFORMATION REQUIRED FROM APPLICANTS**

Proposals should be prepared simply and economically, providing a straightforward, concise description of the applicant's ability to meet the requirements of the RFP. Fancy bindings, colored displays, promotional materials, and so forth, are not desired. Emphasis should be on completeness and clarity of content. Information in the applicant's proposal which should be held confidential must be clearly marked as confidential and comply with an exemption from public inspection as per 1 V.S.A. § 317(c).

Grant proposals should be no longer than 10 pages, with no less than a 12-point font and one-inch margins (resumes **do not** count toward the 10-page limit) and must include at minimum the following information:

### Identification of Organization

State the full name and address of the organization and, if applicable, other subcontractors that will perform, or assist in performing, the work. Include the organization's federal identification number.

### Authorized Negotiators

Include the names, email addresses, and phone numbers of personnel authorized to negotiate the proposed contract with the State. All proposals must be signed by a duly authorized representative of the party (or parties) submitting the proposal.

### Prior Experience Disclosure

Proposals must include a description of the applicant's experience in each of these areas:

1. Clean energy incentive program management and delivery
2. Renewable energy technologies with any specific experience with wood heat systems and other thermal renewable energy technologies
3. Public outreach, customer service, and stakeholder consultation
4. Renewable or clean energy incentive program design development
5. Management of federal grants and reporting
6. Database design and management

### Personnel

Each organization submitting a proposal under this RFP shall have demonstrable knowledge, skills, and experience as it relates to the required minimum scope of services. The proposal must identify all persons who will be employed in the proposed work by skill and qualifications. Identify key personnel by name and title and provide a resume for each (resumes **do not** count toward the 10-page limit). Subcontractors must be listed, including the firm name and address, contact person, and complete description of work to be subcontracted. Include descriptive information concerning subcontractor's organization and abilities.

### Work Plan

Describe in narrative form the plan for accomplishing the work. Indicate an estimation of the number of hours allocated to each task and which staff member(s) will complete the tasks. Include a description of key elements of the program design and a timeline for rollout of the new incentive program design.

Describe how incentives applications will be processed and be paid to the renewable energy installer for the benefit of the customer/household. The process could include payment of the incentive to the installer by the PSD upon approval for payment by the contracted administrator, or the process could include the incentive payment being paid by the contracted administrator, and the PSD would reimburse those payments upon receipt and approval of an invoice. The work plan should also include:

- A plan for program data collection, monitoring, and evaluation
- A plan for the daily administration and delivery of the Program
- A description on coordinating project approvals with the VT Department of Historic Preservation – for federal funding that requires it
- A description of how household income verification will be accomplished for incentives that require it
- A description of how installers will be selected and verified for quality installations for participation in the program.
- A financial management and control plan



### Budget

Applicants must submit a detailed estimated budget range for administration and delivery of the Program for two years and include narrative explanations. The CEDF estimates that in the two years of the budget, \$2,500,000 of incentives would be awarded via the Program. The budget should indicate the administrative/program delivery costs for administering the incentives.

The following cost elements should be included in each proposal:

- Personnel costs (position, \$ rate/hr.)
- Fringe Rate to be applied to the personnel costs
- Indirect Cost Rate
  - List all costs subject to the indirect cost rate
- Travel (include mileage rate, etc.)
- Supplies & Materials
- Sub-Contractors' costs
- Other (specify)

### Additional Information and Comments

Include any other information that is believed to be pertinent, but not specifically requested elsewhere in this RFP.

## **SELECTION CRITERIA**

The PSD will evaluate all proposals received based upon reasonableness of cost, completeness and quality of the proposal, qualifications of the individuals proposed to perform the work, relevance of previous experience, and any other criteria it deems relevant. Acceptance or rejection of any or all proposals will be determined by the exercise of the PSD's sole discretion.

All proposals are subject to an evaluation by the CEDF, the PSD, and/or other reviewers. The PSD reserves the right (but in no way is obligated) to interview the top prospective candidates to aid in the selection process.

The award of the contract will be made based on the following criteria:

#### **1. Experience & Qualifications**

- Experience and expertise in incentive program management, administration, renewable energy technologies (specifically with solid and liquid biomass fuels), public outreach, customer service, renewable energy incentive program design, and clean energy market development.
- Knowledge of other renewable and clean energy incentive programs in Vermont and other states

#### **2. Work Plan**

- Clarity and reasonableness of work plan, including definition and timeliness of tasks to be performed



- Plan and capacity for Program administration and financial management are sufficiently described
  - Strategy to administer and evaluate the incentive program
  - Capacity and timeline to take over administrative duties of the incentive program as soon as possible
3. Budget
- Budget line items and amounts are sufficiently described and justified
  - Administrative costs are reasonable and competitive
  - Program delivery costs are reasonable and competitive
  - Fringe and indirect rates are reasonable and competitive

## **GENERAL TERMS AND CONDITIONS**

1. The CEDF reserves the right to reject any and all proposals received in response to this RFP for any reason, to waive minor irregularities in any proposals received, and to negotiate with any party in any manner deemed necessary to best serve the interests of the State.
2. The CEDF shall not be responsible for any costs incurred by any party in preparation of any proposal submitted in response to this RFP.
3. The CEDF reserves the right to amend or cancel this RFP at any time if the best interest of the State requires such action.
4. News releases pertaining to this RFP, contract award, or the project shall not be made without prior written approval from the CEDF.
5. The CEDF will pay for actual work performed and expenses incurred under this project up to the specified contract maximum. Specific payment provisions will be arrived at upon mutual agreement of the parties and executed in a contract. All payments will require the submission of an itemized billing of work performed in sufficient detail to justify payment.
6. All parties submitting proposals shall be Equal Opportunity Employers. During the duration of the performance of this contract, the contractor will be expected to comply with all federal, state, and local laws respecting non-discrimination in employment.
7. All deliverables submitted by the selected contractor shall become the property of the State.
8. Funds for this program are either State or Federal funds and the selected contractor shall be responsible to meet all restrictions and reporting requirements required by the State of Vermont and the United States Government.



9. The CEDF and the PSD assume no liability in any fashion with respect to this RFP or any matters related thereto. All prospective contractors and their subcontractors or successors, by their participation in the RFP process, shall indemnify, save and hold the CEDF, the PSD, and their employees and agents free and harmless from all lawsuits, causes of action, debts, rights, judgments, claims, demands, damages, losses and expenses or whatsoever kind in law or equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a contractor and any action brought by an unsuccessful applicant.